

ClientTrack User Manual

Wisconsin DCF

June 2023

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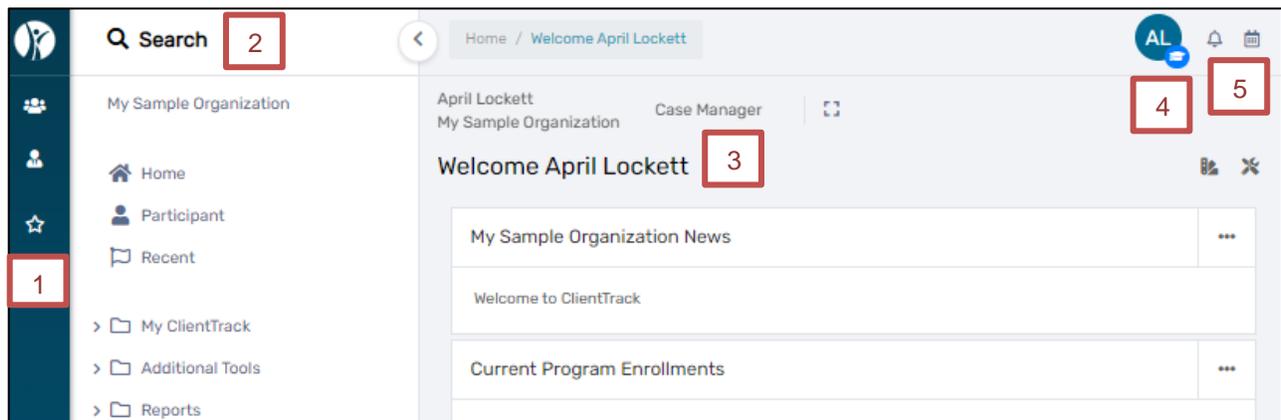
Navigation

This functionality allows a ClientTrack user to navigate from one workspace dedicated to participants, users, reporting, and several other entities to another, according to the setup implemented for the workgroup.

Navigation of Workspaces

When you first log in, you will be taken to the **Home Workspace**, identified in the top left of the screen.

Workspaces function similar to tabs on a web browser. Each Workspace will give you different Menu Groups and Options populated with the forms and functions relevant to the kind of work that Workspace is dedicated to. When you wish to work with Clients, including Client Intake, Assessment, etc., you will use the Client Workspace; when working with multiple Clients or running Reports, you will use the Home Workspace, and so forth.



Regardless of Workspace, the ClientTrack interface employs the following elements:

1. **Main Menu**
This menu allows you to access multiple tools you may need. The ClientTrack logo at the top will bring you back to your Home.
2. **Global Search Bar**
Searches both for data and Menu Options. Almost anything you will need can be navigated to from this search bar.
3. **Entity Information**
Displays information about the Workspace you're currently viewing.
4. **User Icon**
Selecting your User Icon will open a menu from which you can change your Workgroup, Organization, location, theme, and password.
5. **Notifications**
You'll be alerted to new notifications here.



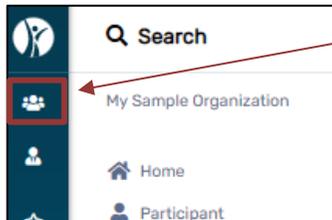
Navigation: Home > Participant > Home > Employers

Find Participant

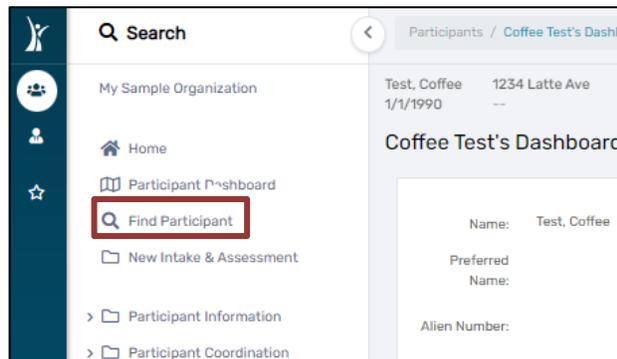
This functionality allows a ClientTrack user to search for and select participants that the user has access to according to the security model implemented for the organization.

Finding a Participant

1. From the Main menu, you will click the icon for the Participants workspace.



2. Select **Find Participant** within the Participants menu on the left.



3. Determine the identifying information for search criteria and enter that information before selecting Search. If fields, other than first and last name, are left blank and Search is selected, a list of all participants the user is able to access will be displayed.

Find Participant

Use the criteria below to find your Participant. To narrow the search, fill in more than one criteria. **Alien Number** and **Birth Date** are the best fields to narrow your search.

First Name: *

Last Name: *

Birth Date:

Sex: -- SELECT --

Sex: ⓘ

Alien Number: ⓘ

Participant ID: ⓘ

- If several participants appear based on the search criteria, scroll through the list, and select the desired participant by clicking on any of their information on the form. The user will be directed to the selected participant's Dashboard.

3 results found.

| First Name | Last Name | Middle Name | Birth Date | Sex | Date of Arrival or Status Granted | Alien Number | City | Resettlement Agency | Program (Enroll Date - Exit Date, Agency) ⓘ |
|------------|-----------|-------------|------------|--------|-----------------------------------|--------------|------------|-------------------------|--|
| Joe | Bond | | 01/15/2013 | Male | 07/01/2022 | | Greenfield | | * Refugee School Impact (RSI) (08/24/2022 - , Departn * Refugee School Impact (RSI) (08/15/2022 - , Departn |
| Jane | Bond | | 12/10/1982 | Female | 07/01/2022 | | Greenfield | World Relief Fox Valley | * Refugee School Impact (RSI) (08/24/2022 - , Departn |

Participant Dashboard

- The participant dashboard will display [Demographic](#) information for the client, their [Family Members](#), [Notifications](#), [Enrollments](#), [Services](#).
- [Notifications](#) can be located by selecting the bell icon to the right of the client's name at the top of the screen.

Bond, James 789 60th St
1/1/1978

James Bond's Dashboard

| | | |
|--|---|---------------------------------|
| Name: Bond, James | Residential Address: 789 60th St | PIN Number: |
| Preferred Name: | Address 2: | CARES Case Number: |
| Alien Number: | City/County/State/Zip code: Greenfield, Milwaukee, WI 53220 | USRAP Case Number: |
| SSN: | County: Milwaukee | Participant ID: |
| Sex: Male | Phone Number: | Relation to Head of Family: |
| Birthdate: 1/1/1978 | Email Address: | Date of Arrival in the USA: |
| Immigration Status: Ukrainian Humanitarian Parolee (UHP) | Intake Organization: Department of Children and Families | Date of Residency in Wisconsin: |
| Secondary Migrant: No | Intake Date: Anwar Sallumi 07/15/2022 | |
| Primary Language: Ukrainian | Last Updated: Anwar Sallumi 08/11/2022 | |
| Nationality: Ukraine | | |

James's Photo

James's Family Members

| Name | Birthdate ⓘ | Age | Sex | SSN | Alien Number | Relation to Principal Applicant |
|-----------------|-------------|-----|--------|-----|--------------|---------------------------------|
| --- Bond, James | 01/01/1978 | 45 | Male | | | Principal Applicant |
| --- Bond, Jane | 12/10/1982 | 40 | Female | | | Spouse |



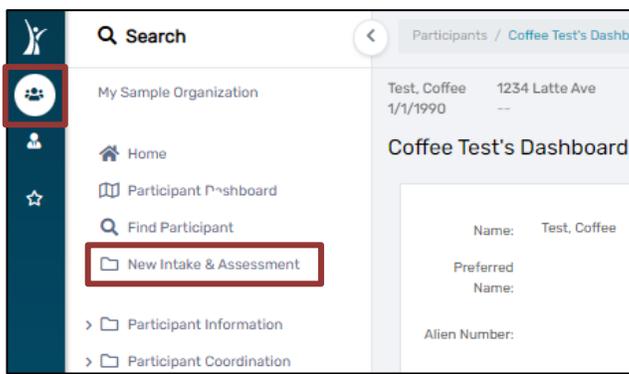
Find a Participant: Participant Workspace > Find a Participant > Participant Dashboard

Completing an Intake

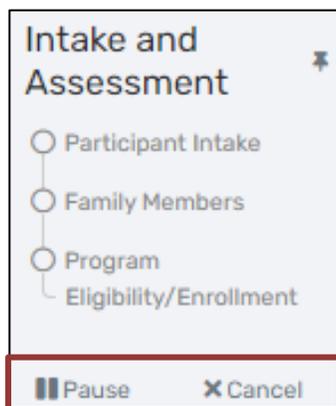
Intake functionality allows for a User to identify and add new participants to the system. An intake ensures that participants are input into the system so that demographics, enrollments, services and referrals can be attributed to the participant.

Intake & Assessment Workflow

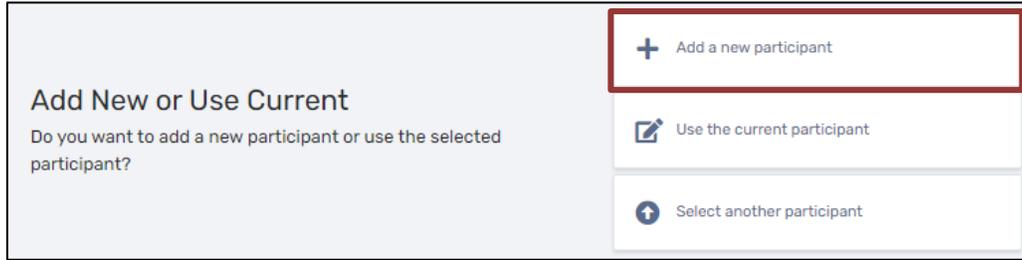
1. Navigate to the [Participant](#) workspace and select the [New Intake & Assessment](#) Menu Option.



2. Users should now see the [Intake & Assessment Workflow](#). There are two options beneath the workflow that will be available to users.
 - a. The first button is a [pause](#) button. The [pause](#) button will allow the user to pause the workflow, save the progress made, and return later.
 - b. The second button is a [cancel](#) button. The [cancel](#) button will allow the user to remove the progress made and exit the workflow.



3. Users will see three options for selecting a participant under the [Add New or Use Current](#) section: [Add a new participant](#), [Use the current participant](#), and [Select another participant](#)



4. Selecting the [Add a new participant](#) will allow the user to enter a brand-new participant to the system.

- a. Users will be redirected to the Search Existing Participants page to search participants on [Last Name](#), [First Name](#), [Birthdate](#), [Sex](#), and/or [Alien Number](#). After selecting [Next](#), the system will search for potential participant record matches to avoid duplication of participants.

- i. If no existing participants exist with the information entered, the user will be directed to the [Participant Intake](#) form.
- ii. If a potential match is identified based on the search criteria, the user will have two options:
 1. Select a participant from the list of results. Users should only select a participant from the list of results when they are confident that they are the same participants based on information reflected in the record.
 2. Select [Next](#) to continue to the [Participant Intake](#) to enter a new participant.

Please address the following:

- Please review the list below for potential duplicates. Click [Next](#) if this is not a duplicate.

Search Existing Participants

The first step in adding a new participant is to search existing participant records for possible matches to avoid duplicate entry. Enter partial identifying information on the participant, and then click [Next](#) to search from existing participant records.

If you are unsure of the Last Name and/or First Name, the wildcard of '%' can be entered in these required fields to allow for searching.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing participant record by clicking on that row.
- If there are no accurate matches, click [Next](#) again to continue to Step 2 in adding a new participant record.

Last Name: *

First Name: *

Birth Date:

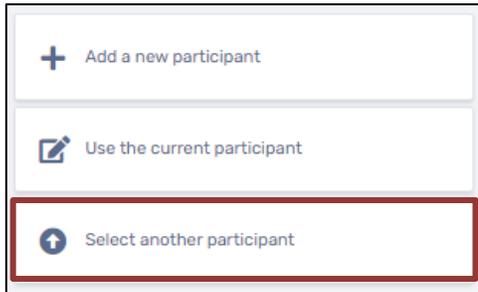
Sex:

Alien Number:

2 results found.

| Last Name ▲ | First Name ▲ | Birth Date ▲ | Sex | Date of Arrival or Status Granted | Alien Number | Resettlement Agency |
|-------------|--------------|--------------|--------|-----------------------------------|--------------|---|
| Testerton | Testressa | 04/06/1989 | Female | 02/07/2022 | 274-373-453 | Ethiopian Community Development Council of Wausau |

5. Selecting [Select another participant](#) will redirect the user to the [Find Participant](#) search form to search for the existing participant and link to their current record.



- a. By selecting a participant from the list of potential matches, the user will be directed to the [Participant Intake](#) form.
- b. If no potential matches appear, the user will need to cancel the workflow by selecting the x above the workflow and restarting it.

Find Participant

Use the criteria below to find your Participant. To narrow the search, fill in more than one criteria. **Alien Number** and **Birth Date** are the best fields to narrow your search.

Last Name: *

First Name: *

Birth Date:

Sex: -- SELECT --

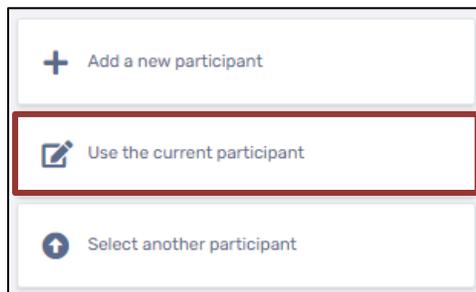
Alien Number:

Participant ID:

2 results found.

| Last Name | First Name | Middle Name | Birth Date | Sex | Date of Arrival or Status Granted | Alien Number | City | Resettlement Agency | Program (Enroll Date - Exit Date, Agency) |
|-----------|------------|-------------|------------|--------|-----------------------------------|--------------|--------|---|--|
| Testerton | Testressa | | 04/06/1989 | Female | 02/07/2022 | 274-373-453 | Wausau | Ethiopian Community Development Council of Wausau | * Refugee School Impact (RSI) (05/18/2022 - , Community Services Agency, Inc.) * Refugee School Impact (RSI) (05/18/2022 - , Community Services Agency, Inc.) * Refugee School Impact (RSI) (05/18/2022 - , Community Services Agency, Inc.) * RSS - Employment & Employability (04/18/2022 - , Multicultural Community Center) |
| Testerton | Tester | | 04/15/1988 | | 02/07/2022 | 084-845-246 | Wausau | Ethiopian Community Development Council of Wausau | * Refugee School Impact (RSI) (05/18/2022 - , Community Services Agency, Inc.) * Refugee School Impact (RSI) (05/18/2022 - , Community Services Agency, Inc.) * Refugee School Impact (RSI) (05/18/2022 - , Community Services Agency, Inc.) * RSS - Employment & Employability (04/18/2022 - , Multicultural Community Center) |

6. Selecting [Use the current participant](#) will take the user to the [Participant Intake](#) form.



Participant Intake Form

7. The [Participant Intake](#) form contains pages for [Participant Profile](#), [Family and Contact Information](#) and [Immigration & Demographics](#) pages.

a. Anything marked with a red asterisk will be required before the user can move forward in the [Participant Intake](#). Any fields not marked with the red asterisk are recommended and may be filled out if the information is available and applicable.

b. If all the required fields are filled in, the user may review, update and/or add information.

i. If updates or additions are required, the user may make those changes and select [Save](#) at the bottom of the page.

ii. If no updates or additions are required, the user may select [No Changes](#) to proceed forward in the workflow.

The screenshot shows the 'Participant Intake' form with the 'Participant Profile' section active. The form contains the following fields and values:

- First Name: * James
- Last Name: * Bond
- Middle Name: (empty)
- Preferred Name: (empty)
- Birth Date: * 01/01/1978
- Birth Location: Not US Born
- Immigration Status: * Ukrainian Humanitarian Parolee (UHP)
- Alien Number: (empty)
- SSN: (empty)
- PIN Number: (empty)
- CARES Case Number: (empty)
- USRAP Case Number: (empty)
- Participant Age: 45
- Organization: Department of Children and Families
- Intake Date: 07/15/2022

At the bottom right of the form, there are two buttons: 'Save' and 'No Changes', both highlighted with a red box.

Family Members

8. The user will be directed to the [Family Members](#) section of the [Intake & Assessment Workflow](#). This form will display family members already associated to the participant record and allow users to review/add family members on the [Family Members](#) form.

a. If all family members are added and correct, select [Continue](#) to proceed.

The screenshot shows the 'Family Members' section of the 'Intake and Assessment' workflow. The page title is 'Family Members' and it includes a breadcrumb trail: 'Participant Intake > Family Members'. Below the title, there is a message: 'The members of the participant's current family are displayed below. To add a new family member, click **Add Family Member**. To edit the family member's information, choose **Edit** next to the desired record.'

At the bottom right of the page, there is a button labeled '+Add Family Member', which is highlighted with a red box.

| Name | Birthdate | Age | Sex | SSN | Alien Number | Relation to Principal Applicant | Primary Language |
|------|-----------|-----|-----|-----|--------------|---------------------------------|------------------|
|------|-----------|-----|-----|-----|--------------|---------------------------------|------------------|

Program Eligibility / Enrollment

9. The user will be directed to [Program Eligibility/Enrollment](#) section of the [Intake & Assessment Workflow](#). This form will display programs that are available to enroll the participant into.

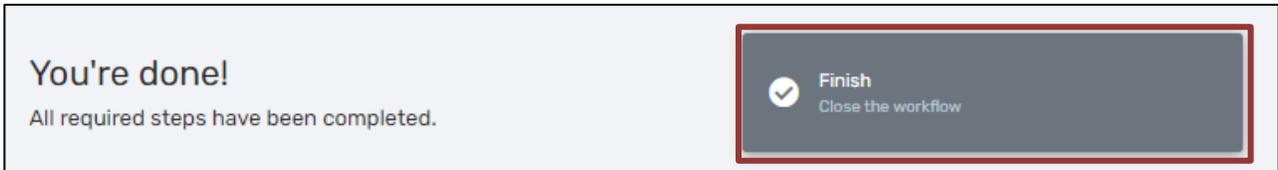
- a. The programs that have eligibility criteria will display as separate rows on the form. Each program should have an [Eligibility Result](#) available based on the information entered on the previous forms of the [Intake & Assessment Workflow](#)
- b. The checkbox at the top of the form will filter out programs that have no eligibility criteria.
- c. Users can select the [Eligibility Result](#) to see a pop-up window containing information regarding the eligibility criteria for the program.

10. If the participant should be enrolled into one of the programs, the user may select the [Arrow](#) in the row of the program the participant should be enrolled into.
 - a. The user will be redirected to the [Program Enrollment](#) form. Here, the user will be prompted to select the [Head of the Enrollment](#), [Enrollment Date](#), and select which family members to enroll.

11. Once the Program Enrollment fields are complete, select Save. Users will then be redirected back to the program eligibility screen to complete another enrollment.

Finish the Workflow

12. If the participant should not be enrolled into one of the programs, the user may select Next to complete the Intake and Assessment Workflow without enrolling the participant.
- The user should see the [Intake and Assessment](#) workflow have green checkmarks next to all the completed steps. The user may select [Finish](#) to close out of the [Intake and Assessment](#) workflow and return to the [Participant Dashboard](#).



Completing an Intake: Participant Workspace > New Intake & Assessment Workflow > Add new participant / Use current participant / Find another participant > Family Members / Program Eligibility / Finish Workflow

Editing a Participant Intake Record

1. Find and select the desired participant using ClientTrack search functionality through the [Find Participant](#) menu option.
2. Once the correct participant is selected and appears in the Entity toolbar at the top of the page, select the [Participant Information](#) menu option. This opens a data entry form that allows the participant's data to be changed.
3. Add/update any participant data fields, as necessary.
4. Select [Save](#) to save the newly edited participant record.

The screenshot shows a web application interface for editing a participant record. At the top, the participant's name "Testerton, Testressa" and birth date "4/6/1989" are displayed. Below this is a navigation bar with three tabs: "Participant Intake", "Family and Contact Information", and "Immigration & Demographics". The "Participant Intake" tab is active, showing a form titled "Participant Intake" with the instruction "Complete the participant's identifying information." The form includes a "Participant Profile" section with a warning message: "GENERATING AN ALIEN NUMBER IN CLIENTTRACK IS ONLY ALLOWED IF THE PARTICIPANT HAS NOT YET BEEN ASSIGNED AN ALIEN NUMBER BY THE U.S. DEPARTMENT OF HOMELAND SECURITY. DCF WILL MONITOR ALL SYSTEM GENERATED ALIEN NUMBERS TO ENSURE THAT THIS FEATURE IS USED APPROPRIATELY." The form fields are as follows:

| | |
|--------------------|--------------------------------|
| Last Name: | * Testerton |
| First Name: | * Testressa |
| Middle Name: | |
| Preferred Name: | |
| Birth Date: | * 04/06/1989 |
| Birth Location: | Not US Born |
| Alien Number: | * 274-373-453 |
| SSN: | |
| PIN Number: | |
| CARES Case Number: | |
| USRAP Case Number: | HB124235 |
| Participant Age: | 33 |
| Organization: | Multicultural Community Center |

At the bottom right of the form, there are "Save" and "Cancel" buttons. A graduation cap icon is also visible on the right side of the form.



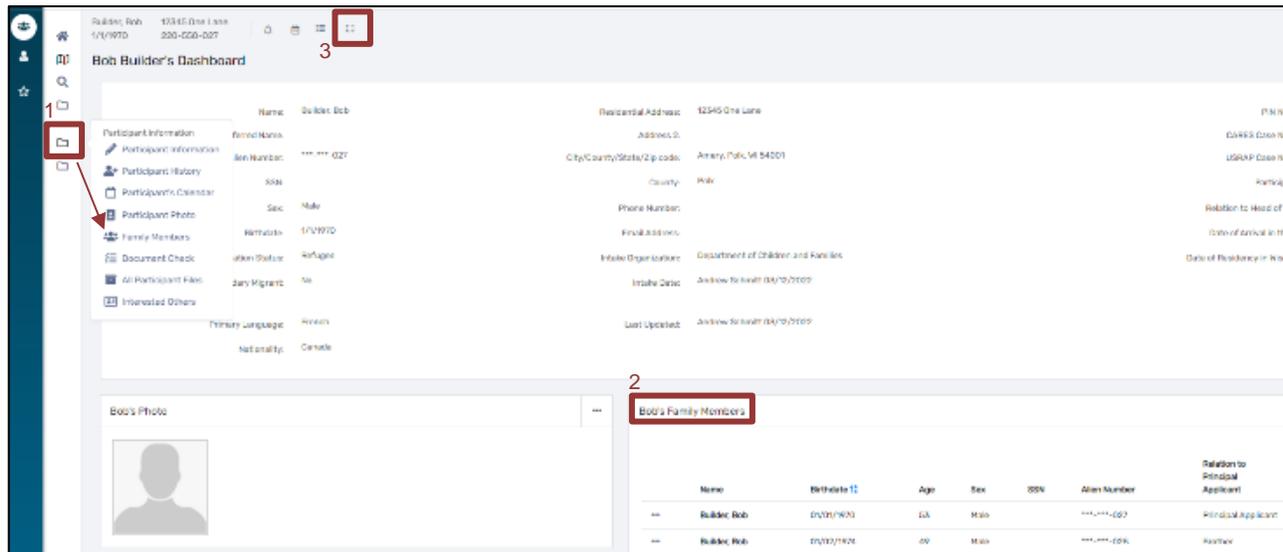
Edit a Participant Intake Record: Participant Workspace > Participant Dashboard > Participant Information

Family Members Management

Family Members functionality allows for a User to view and add Family Members to the selected participant's current family. A Family is defined as any group of one participant or more.

Review Family Members

[Family Members](#) can be reviewed and edited in various places through the system. All options will require the user to be in the [Participant Workspace](#), and the [Participant](#) to be in focus first.



Option 1:

1. Navigate to the [Participant](#) workspace and select the [Participant Information](#) Menu Group, followed by the [Family Members](#) Menu Option.
2. This will redirect users to the [Family Members](#) screen where users will have multiple options to Add New, Select the participant, and/or Edit.

Option 2:

1. Navigate to the [Participant](#) workspace and select the [Participant Dashboard](#) followed by the [Participants Family Members](#) dashboard section.
2. This will redirect users to the [Family Members](#) screen where users will have multiple options to Add New, Select the participant, and/or Edit.

Option 3:

1. Navigate to the [Participant](#) workspace and select the [Expand](#) button on the Client's dashboard to the right of the participants name at the top left of the screen.
2. This will display each member of the [Family](#) and allow the user to select the name of each participant to be redirected to their [Participant Dashboard](#).
 - a) Additionally, users will see options for adding [Case Notes](#), [Services](#), and viewing the participants' [Calendar](#). These options act as shortcuts to navigate to those forms for each client in the family.



Edit a Participant: Participant Workspace > Participant Dashboard > Participant Information

Adding a Family Member

1. Navigate to the [Participant](#) workspace and select the [Participant Information](#) Menu Group, followed by the [Family Members](#) Menu Option.



2. After navigating to the [Family Members](#) menu option, find the “Add Family Member” button at the top right of the page, above the existing family members.

The members of the participant's current family are displayed below. To add a new family member, click **Add Family Member**. To edit the family member's information, choose **Edit** next to the desired record.

[+ Add Family Member](#)

| | Name ▲ | Birthdate ▲ | Age ▲ | Sex ▲ | SSN | Alien Number | Relation to Principal Applicant ▲ | Primary Language ▲ |
|---|----------------------|-------------|-------|-------|-----|--------------|-----------------------------------|--------------------|
| ➤ | Testerton, Tester | 04/15/1988 | 34 | Male | | ***-**-246 | Self | Dari |
| ➤ | Testerton, Testressa | 04/06/1989 | 33 | Male | | ***-**-453 | Spouse | Albanian, Gheg |

3. Enter the [First Name](#), [Last Name](#) and [Birth Date](#) of the new family member. The system will alert users to potential matches. If there is a potential match, users may select that row which will open the existing participant record. If the system finds no potential matches, users will be taken to the next page.

Family Member Information

Search Existing Participants Family Member Family and Contact Information Immigration & Demographics

Search Existing Participants ⓘ

The first step in adding a new family member is to search existing participant records for possible matches to avoid duplicate entry. Enter partial identifying information on the family member, and then click **Next** to search from existing participant records.

If you are unsure of the Last Name and/or First Name, the wildcard of '%' can be entered in these required fields to allow for searching.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing participant record by clicking on that row.
- If there are no accurate matches, click **Next** again to continue to Step 2 in adding a new participant record.

First Name: *

Last Name: *

Birth Date: MM/DD/YYYY

Sex:

Alien Number:

4. Add/update data fields on the [Family and Contact Information](#) and [Immigration & Demographics](#) pages.
5. Select [Save](#) in the lower right-hand corner. The User will return to the Family Members form.



Edit a Participant: Participant Workspace > Participant Dashboard > Participant Information

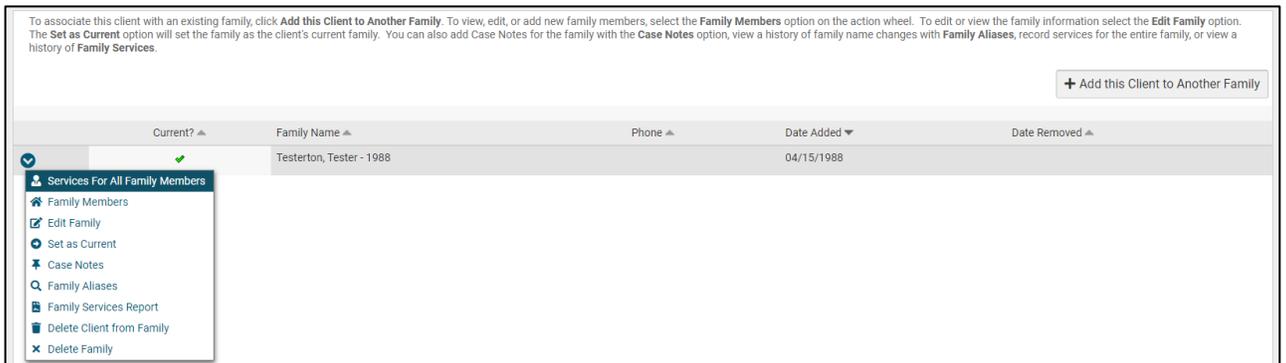
Family History

This functionality allows a User to view the selected participant's history of families they have been a part of. The Family History form also contains a button that allows the User to add the selected participant to another family.

1. From the [Participant Dashboard](#), find [Participant History](#) in the [Participant Information](#) menu group and navigate to the [Family History](#) option.



2. Users will see a row for each historical value the family member has. There is also an action button for each row that will provide the user an array of options.



Family History: Participant Workspace > Participant Dashboard > Participant Information > Participant History > Family History

Adding a Participant to Another Family

This functionality would be used when locating an individual who is entered separately, as their own family, but needs to be tied to an existing family.

1. From the [Family History](#) form, select [Add this Participant to Another Household](#) button, the user will be redirected to a data entry form.



2. Enter in the family name and select the [Lookup](#) icon (the magnifying glass to the right of the Family Name) and on the new form, find and select the household where the selected participant needs to be added.

Identify the client's family by clicking the [Lookup](#) icon. A new family can also be added by clicking the [Lookup](#) icon, then clicking the [Add New Family](#) button. After you've identified the family, verify that the contact information is correct. If it is not correct, please correct it below. Clicking [Set as Current Family](#) will tag this as the current family in family summary. Clicking [Remove Client from All Other Families](#) will remove the client from any other family.

| | | | |
|------------------------------------|---|---|----------------------------------|
| Family Name: | * | <input type="text"/> | <input type="button" value="Q"/> |
| Family Address: | | <input type="text"/> | |
| Family Zip Code: | | <input type="text"/> | |
| Family Home Phone: | | <input type="text"/> | |
| Date Added: | | <input type="text" value="05/18/2022"/> | <input type="button" value="📅"/> |
| Relationship To Head of Household: | * | -- SELECT -- | ▼ |
| Relationship Type: | | -- SELECT -- | ▼ |
| Set as Current Family: | | <input type="checkbox"/> | |

3. Select the [Relationship To Head of Household](#) and, if applicable enter the [Relationship Type](#) and check the [Set as Current Family](#).
4. Setting as [Current Family](#) will create this family as the primary family for the participant.
5. If you select [Set as Current Family](#), you will see an additional question

| | |
|---|-------------------------------------|
| Set as Current Family: | <input checked="" type="checkbox"/> |
| Remove Participant from all Other Families: | <input checked="" type="checkbox"/> |

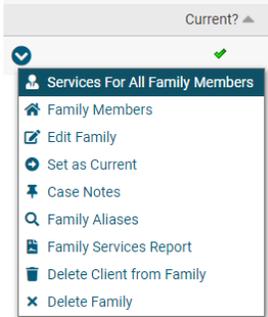
6. Removing the participant from all other families will remove the participant from any other family and integrate the participants' record into the new family.



Adding a Participant to Another Family: Participant Workspace > Participant Dashboard > Participant Information > Participant History > Family History > Add this Participant to Another Family

Adding a Service for All Family Members

1. From the [Family History](#) form, select the Action Button to the left of the household that needs services added, followed by [Services For All Family Members](#).



2. The user will be redirected to the [Quick Services for All Family Members](#) form.

Use this form to assign a single service to multiple members of an enrollment case. Note that the only services you'll be able to assign are related to the program for the enrollment that you choose so therefore you must chose the enrollment first and then the service drop down list will be populated from your selection. Also note that the enrollment drop down list only shows enrollments that are associated to programs that have services that can be assigned.

Enrollment: * Refugee School Impact (RSI) 05/18/2022 -
Service: * Tuition Assistance

2 results found.

| <input type="checkbox"/> | Name ▲ | Begin Date ▲ | Comments ▲ |
|--------------------------|----------------------|----------------------|----------------------|
| <input type="checkbox"/> | Testerton, Tester | <input type="text"/> | <input type="text"/> |
| <input type="checkbox"/> | Testerton, Testressa | <input type="text"/> | <input type="text"/> |

3. Choose the [Enrollment](#) first, followed by the desired [Service](#).
4. Select [Search](#) to the right. This will search the selected enrollment for other enrolled Family Members.
5. Users may select the [Family Members](#) to apply the service to, enter the date and any comments.
6. Select [Save & Close](#) button, the user will be redirected to previous menu option.



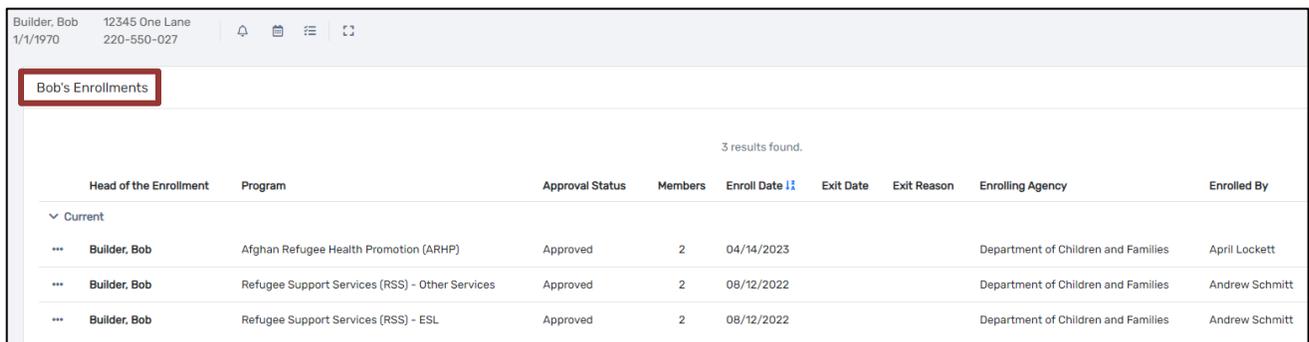
Adding a Service for All Family Members: Participant Workspace > Participant Dashboard > Participant Information > Participant History > Family History > Action Button > Services for All Family Members

Completing an Enrollment

The Enrollment functionality allows for a user to enroll and associate a participant and family members to a specific program. A participant may have multiple enrollments over time where they may receive services and referrals.

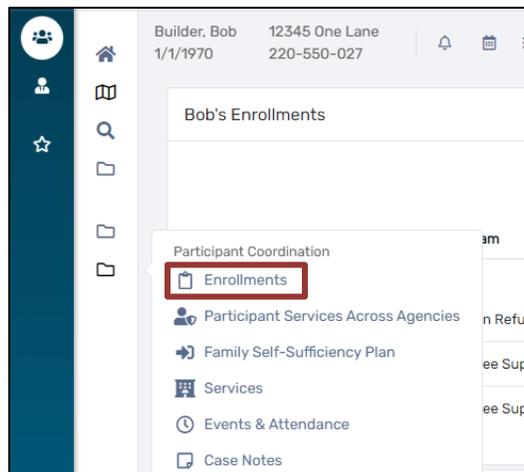
View Enrollments

1. Navigate to the [Participant](#) workspace and bring the correct participant into focus.
2. [Enrollments](#) can be viewed in two different ways:



| Head of the Enrollment | Program | Approval Status | Members | Enroll Date | Exit Date | Exit Reason | Enrolling Agency | Enrolled By |
|------------------------|---|-----------------|---------|-------------|-----------|-------------|-------------------------------------|----------------|
| Builder, Bob | Afghan Refugee Health Promotion (ARHP) | Approved | 2 | 04/14/2023 | | | Department of Children and Families | April Lockett |
| Builder, Bob | Refugee Support Services (RSS) - Other Services | Approved | 2 | 08/12/2022 | | | Department of Children and Families | Andrew Schmitt |
| Builder, Bob | Refugee Support Services (RSS) - ESL | Approved | 2 | 08/12/2022 | | | Department of Children and Families | Andrew Schmitt |

- a) First, users may navigate to the [Participant Dashboard](#), locate the [Participants' Enrollments](#) and Click on the [Participant's Enrollments](#) header.
- b) Second, users may navigate to the [Participant Coordination](#) menu group and select the [Enrollments](#) menu option.



3. Both options will direct users to the [Enrollments](#) history form where users can View, Edit, or Add a New Enrollment.

Completing an Enrollment via Enrollments

1. After navigating to the [Enrollments](#) form, the user will see a row representing each of the participants' previous and current enrollments.
2. Select [Add New Enrollment](#).

All client enrollments display below with current enrollments listed at the top. To add a new enrollment for the client, select **Add New Enrollment**. Note that editing, reentering or deleting an enrollment will not affect the other members of the case. Enrollment changes need to be made for each case member individually.

+ Add New Enrollment

2 results found.

| Head of the Enrollment ▲ | Program ▲ | Approval Status ▲ | Members ▲ | Enroll Date ▼ | Exit Date ▲ | Exit Reason ▲ | Enrolling Agency ▲ | Enrolled By ▲ | Primary Case Manager ▲ |
|--------------------------|-----------------------------|-------------------|-----------|---------------|-------------|---------------|---------------------------------|-----------------|------------------------|
| Current | | | | | | | | | |
| ▶ Testerton, Tester | Refugee School Impact (RSI) | Approved | 2 | 05/18/2022 | | | Community Services Agency, Inc. | Jessica Fleming | Jessica Fleming |
| ▶ Testerton, Tester | Refugee School Impact (RSI) | Approved | 2 | 05/18/2022 | | | Community Services Agency, Inc. | Jessica Fleming | Jessica Fleming |

3. The user will be redirected to the [Program Enrollment](#) page.

Please select the program to enroll the members of this case into. Choose one family member as the Head of the Enrollment and then select the other family members that will be included in the enrollment.

Program: * Refugee School Impact (RSI) ▼

Head of the Enrollment: * Testerton, Tester ▼

Enrollment Date: * 05/18/2022 📅

Case Members

Identify which family members are included in this case below.

| <input type="checkbox"/> | Participant Name ▲ | Age ▲ | Eligibility Status | Participant ID ▲ | Case Manager* ▲ |
|-------------------------------------|----------------------|-------|--------------------|------------------|-------------------|
| <input checked="" type="checkbox"/> | Testerton, Tester | 34 | ✓ Passed | 72 | Jessica Fleming 🔍 |
| <input checked="" type="checkbox"/> | Testerton, Testressa | 33 | ✓ Passed | 73 | Jessica Fleming 🔍 |

of Case Members: 2 ⓘ



4. From the Program Enrollment form, users should select the [Program](#), [Head of the Enrollment](#), [Enrollment Date](#) and the [Family Members](#) that should be included in the enrollment.
 - a. When the program is selected, the user should see the [eligibility status](#) in the [Case Member](#) table will update based on the participants eligibility for each family member.
5. Select [Save](#) and the user will be redirected back to the [Participant](#) Dashboard and the participants Enrollments should now be visible.



Completing an Enrollment: Participant Workspace > Participant Coordination > Enrollments > Add a New Enrollment

Services

Services functionality allows for a user to record services that were provided to the participant during their participation with the program. There are three types of services available to enter: [Services](#), [RSI Services](#), and [RYM Services](#).

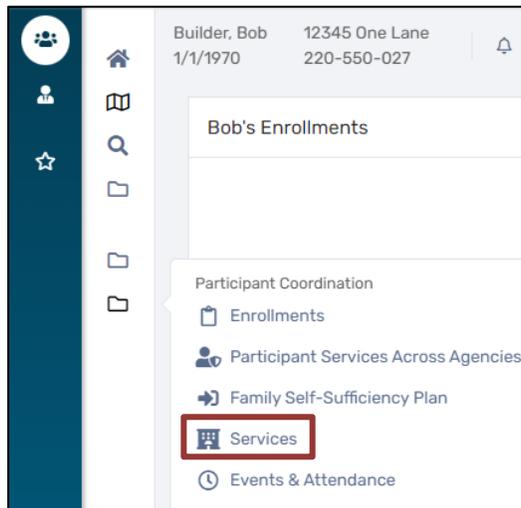
[Services](#) is the general category of services available to a user.

[RSI Services](#) are the services associated with the Refugee School Impact (RSI) program.

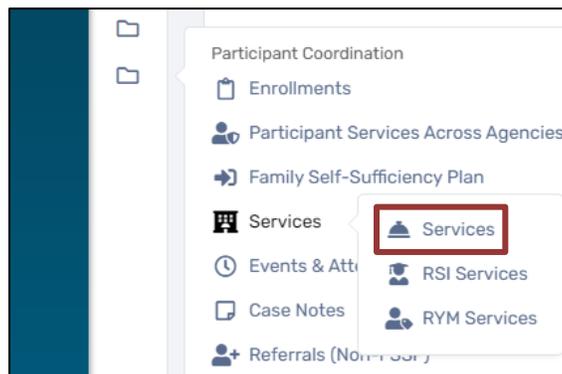
[RYM Services](#) are the services associated with the Refugee Youth Mentoring (RYM) program.

Entering a Service

1. Navigate to the [Participant](#) workspace, find the [Participant Coordination](#) menu group, and select the [Services](#) menu option.



2. Select the type of service to add.



Add New Service (Services Option on Services Menu)

1. Select [Add New Service](#) in the right-hand corner to proceed.
2. Users are required to select an [Associated Enrollment](#) and [Service](#) from the drop-down lists. If no Associated Enrollment is listed, one will need to be added prior to saving the service.
3. If applicable, select the corresponding Associated [Goal](#) and [Associated Need/Barrier](#) from the drop-down lists. As with the Enrollment list, missing Barriers and Goals will need to be added prior to saving the service.
4. It is required to add a case note within 10 days of delivering the service. Click on the button "[Add a Case Note](#)" which opens the standard Case Notes form.



Service

Enter the information about the service provided to the client below. For the Associated Enrollment, only the programs will appear that the client is enrolled in.

Associated Enrollment: * ▼

Service: * ▼

Service Date: * 📅 ℹ️

Case Note Hint

Case notes that describe the service provided must be completed within 10 days of delivering the service.

Add a Case Note

Associated Goal: ▼ ℹ️

Associated Need/Barrier: ▼ ℹ️

5. Select [Save](#).
6. Once the service has been entered, it will display on the Services form, where additional options may be available.

Client Services

The participant's service history displays below. To record a service, click [Add New Service](#). To edit or view an existing service, click [Edit Service](#) next to the record.

+ Add New Service

1 result found.

| Date | Service | Units | Associated Enrollment | Agency |
|-----------------------------|---------------------|-------|---|-------------------------------------|
| September 2022 (1 Services) | | | | |
| 🗑️ 09/22/2022 | RSS OS - Child Care | 1.00 | Refugee Support Services (RSS) - Other Services | Department of Children and Families |
| | | 1.00 | | |



Entering Services: Participant Workspace > Participant Coordination > Services > Services

Add RSI Services (Refugee Services Impact)

1. Select [Add New](#) in the right-hand corner to proceed.



2. Users are required to select a corresponding [Enrollment](#) from the drop-down list. If no Enrollment is listed, one will need to be added prior to saving the service.

RSI Services Entry

Select the service to create by answering only the question that pertains to this record. Multiple questions may be answered on this form.

Enrollment: * -- SELECT -- ▾

Date of Record: 4/17/2023

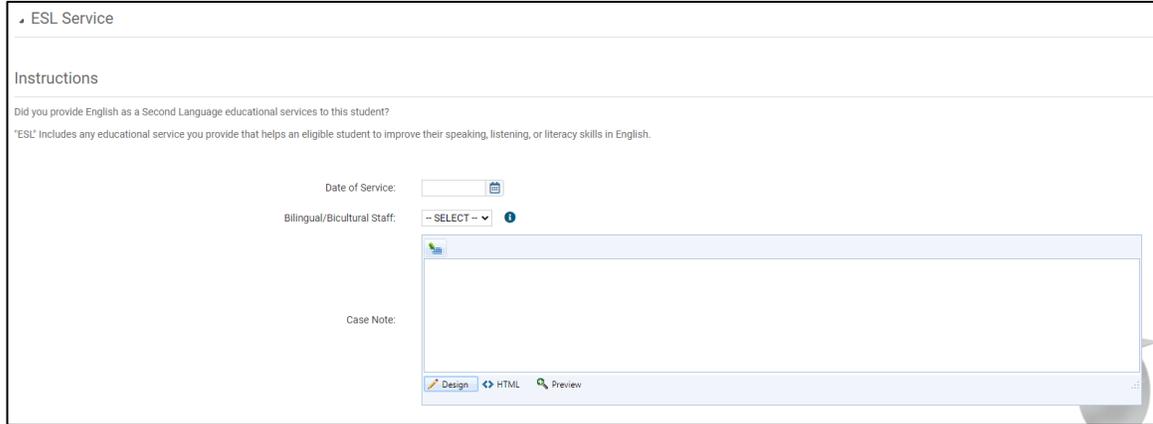
Participant: * -- SELECT -- ▾ ⓘ

Provided By: * -- SELECT -- ▾ ⓘ

3. Select the appropriate [Participant](#) and [Provided By](#) values.
4. Users will then see several service offerings outlined on the page. They include:
 - [Orientation](#)
 - [ESL Service](#)
 - [After School Program](#)
 - [Tutoring Services](#)
 - [Summer School programs](#)
 - [Utilized Specialized Materials](#)
 - [Utilized Specialized Technology](#)
 - [Interpretation](#)
 - [Transportation](#)
 - [Engagement with Peers](#)
 - [Grade Promotion](#)
 - [Other Approved COVID-19 Services](#)
5. Each service offering can be expanded by selecting the arrow the left of the service name, or the service name itself.



- Once expanded, each service will contain instructions for that service and the fields can be filled out as appropriate. All service offerings will have [Date of Service](#), [Bilingual/Bicultural Staff](#) and [Case Notes](#) available to record answers. Additional fields may be available depending on the service offering.



- Select [Save](#).
- Once the RSI service has been entered, it will display on the Services form, where additional options to View or Edit are available.



Entering Services: Participant Workspace > Participant Coordination > Services > RSI Services

Add RYM Services (Refugee Youth Mentoring)

1. Select [Add New](#) in the right-hand corner to proceed.



2. Users are required to select a corresponding [Enrollment](#) from the drop-down list. If no Enrollment is listed, one will need to be added prior to saving the service.

RYM Services Entry

Select the service to create by answering only the question that pertains to this record. Multiple questions may be answered on this form.

Enrollment: * -- SELECT --

Date of Record: 4/17/2023

Service is Provided By: * -- SELECT --

3. Select the appropriate [Service is Provided By](#) value.

4. Users will then see several service offerings outlined on the form. They include:

- [Orientation](#)
- [Assessment/Plan Completed](#)
- [Milestone Achieved](#)
- [Goal Achieved](#)
- [Social and Life Skills](#)
- [Cultural Exploration](#)
- [Engagement with Peers](#)
- [Tutoring or Academic Support](#)
- [Career Development](#)
- [Health and Wellness Literacy](#)
- [Financial Literacy](#)
- [Civic Engagement](#)
- [Meeting with Mentor](#)
- [Received Incentive](#)
- [Other Approved COVID-19 Services](#)

5. Each service offering can be expanded by selecting the arrow the left of the service name, or the service name itself.

▸ Orientation

- Once expanded, each service will contain instructions for that service and the fields can be filled out as appropriate. All service offerings will have varying fields available to record answers. Most service offerings will have [Date of Service](#), [Bilingual/Bicultural Staff](#) and [Case Notes](#) as available fields.

Tutoring or Academic Support
 Instructions
 Did this student receive "Tutoring" or "Academic Support" services?
 "Tutoring" includes any one-on-one or small group services in which an eligible student receives specialized instruction on academic course content. Tutoring can occur during or outside of regular classroom hours.
 "Academic Support" services include any other services designed to support the youth's academic success in school (K-12 or post-secondary). Examples may include but are not limited to referral to supplemental academic programs, or connection to supplemental materials.

Date of Service:
 Bilingual/Bicultural Staff: -- SELECT --
 Case Note:

Design HTML Preview

[Save](#) [Cancel](#)

- Select [Save](#).
- Once the [RYM service](#) has been entered, it will display on the [Services](#) form, where additional options to [View](#) or [Edit](#) are available.

Participant's RSI Services are displayed below. To add a new service, click **Add New**. To view or edit a record displaying in the list, click **View** or **Edit** next to the desired record.

[+ Add New](#)

1 result found.

| Date of Service/Participation ▼ | Service/Participation ▲ | Created By ▲ | Agency ▲ |
|---------------------------------|-------------------------|-----------------|---------------------------------|
| 06/15/2022 | RSI - Orientation | Jessica Fleming | Community Services Agency, Inc. |

View **Edit**



Entering Services: Participant Workspace > Participant Coordination > Services > RYM Services

View a Service

1. Select the [View](#) option from the action button on the row of the service the user would like to view.
2. Selecting [View](#) direct the user to a read only version of the entered service. No edits can be made with this option.

Edit a Service

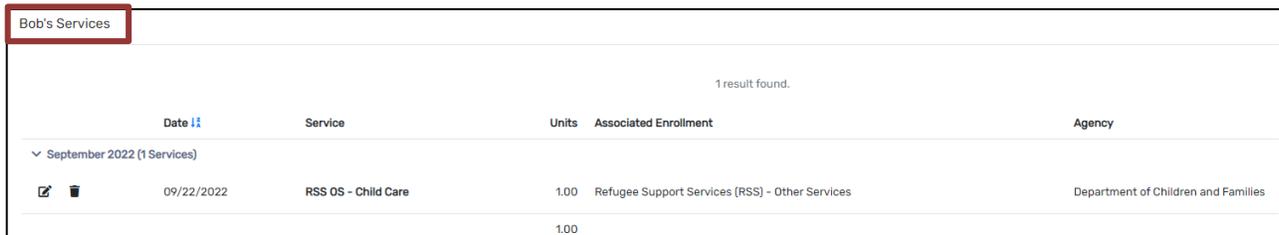
1. Select the [Edit](#) option from the action button on the row of the service the user would like to edit.
2. Selecting [Edit](#) will direct the user to the appropriate Service where appropriate information may be updated or changed.
3. Select [Save](#).
4. The updated information will reflect on the appropriate [Services](#) form.

Participant Services

Services can be viewed and edited in various places in the system.

1. Participant Dashboard:

- In the [Participant](#) workspace, locate bring the participant into focus and navigate to the [Participant Dashboard](#).
- Services that have been entered for the participant, regardless of type, will display in the [Services](#) section of the dashboard.
- Users can also select the [Participant Services](#) header where they will be redirected to the [Services](#) history form.



Bob's Services

1 result found.

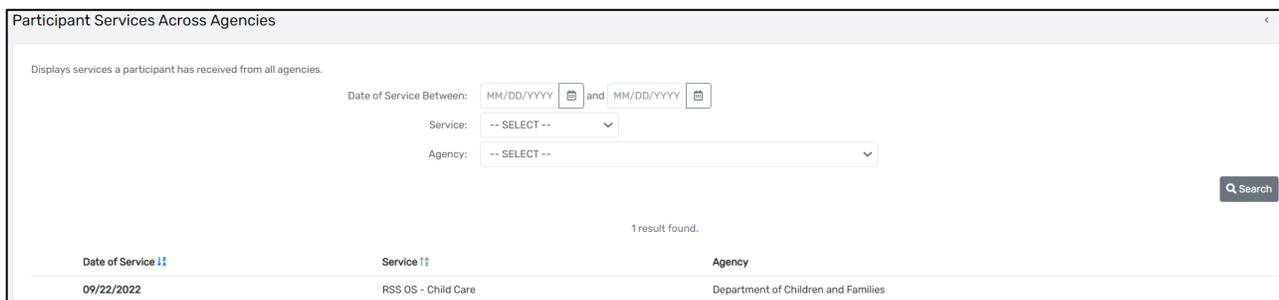
| Date | Service | Units | Associated Enrollment | Agency |
|------------|---------------------|-------|---|-------------------------------------|
| 09/22/2022 | RSS OS - Child Care | 1.00 | Refugee Support Services (RSS) - Other Services | Department of Children and Families |

2. Services History Form

- Depending on the type of service, users can also view the existing services by navigating to the [Participants](#) workspace, the [Participant Coordination](#) menu group and the appropriate [Service](#) from the Services menu option.
- Selecting from Services, RSI or RYM services will direct the user to the [Services](#) history form.

3. Participant Services Across Agencies

- With the appropriate participant in focus, navigate to the [Participant Coordination](#) menu group and select [Participant Services Across Agencies](#).
- [Security Organization](#) determines which services are available to be seen.
- Users will be able to search for services, by [Service](#) type, and/or [Agency](#), provided to the participant.



Participant Services Across Agencies

Displays services a participant has received from all agencies.

Date of Service Between: MM/DD/YYYY and MM/DD/YYYY

Service: -- SELECT --

Agency: -- SELECT --

1 result found.

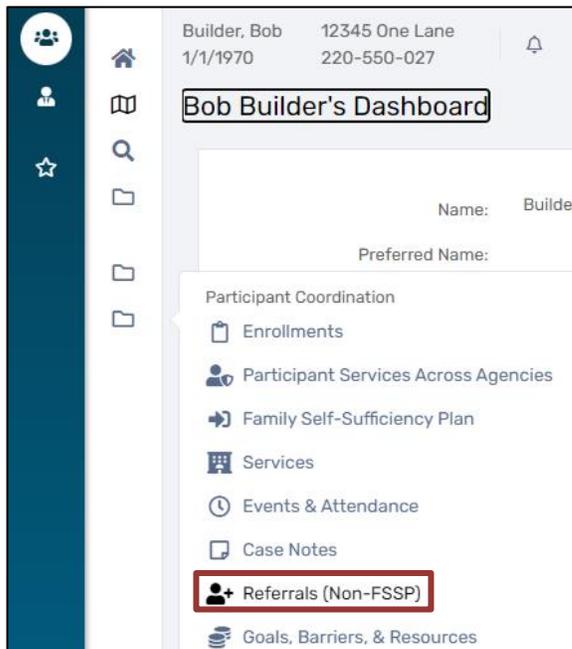
| Date of Service | Service | Agency |
|-----------------|---------------------|-------------------------------------|
| 09/22/2022 | RSS OS - Child Care | Department of Children and Families |

Referrals

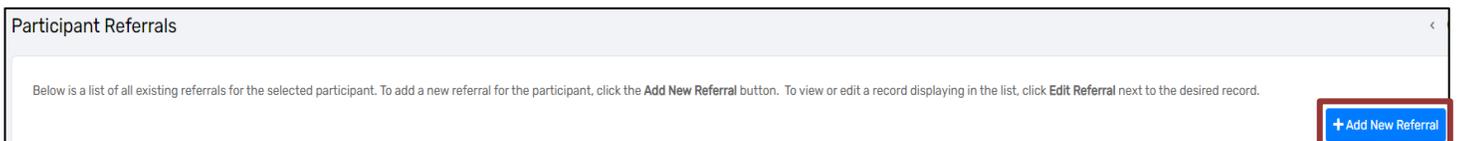
Referrals allows for a user to record referrals that were made to or received from a provider during the participants participation with the program.

Recording a Referral

1. Navigate to the [Participant](#) workspace, find the Participant Coordination menu group, and select the [Referrals \(Non-FSSP\)](#) Menu Option.



2. Select [Add New Referral](#) in the right-hand corner to proceed.



3. Users are required to select a [Referral Date](#) and [Referral Service](#) to proceed because the following section is dependent on the type of Referral Service.

- Use the search function via the magnifying glass to locate the appropriate **Provider**. This list will be tailored to only providers who offer the **Referral Service** selected above.

Referral Recipient

Select the agency referral recipient as the Refer to Provider.

Refer to Provider: *

Provider Contact:

Contact Phone Number:

- The Referral Source section will automatically fill in information from the user and the associated provider agency. The user may then adjust the **Status**, leave a **Comment** and if applicable, add an **Associated Need/Barrier**.

Referral Source

Select the agency referral source as the Refer from Provider.

Refer from Provider: *

Refer from User:

Location:

Status: *

Comments:

Associated Need/Barrier:

- The final section is available for the user to select if the Participant has authorized that his/her information can be released to the selected provider by selecting one or all of the check boxes.

Information Release

If the Client has authorized that his/her information can be released to the selected provider, please indicate this below. Doing so will cause an email to be automatically generated and sent to this provider with information regarding the referral.

Email Authorized:

Authorize Information Release:

Resend Email:



- Select **Next** to navigate to the **Referral Outcome** section.

Outcome Information

Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged:

Appointment Date:

Result Date:

Result:

Comments:

- If the referral has an outcome at that point, the user may record the fields available on the **Referral Outcome** section. If the referral does not yet have an outcome, the user may select **Finish** and return to add the outcome at a later time.

9. Once the referral has been entered, it will display on the [Participant Referrals](#) form, where additional options may be available.

Below is a list of all existing referrals for the selected client. To add a new referral for the client, click the **Add New Referral** button. To view or edit a record displaying in the list, click **Edit Referral** next to the desired record.

[+ Add New Referral](#)

| Date ▼ | From Provider ▲ | To Provider ▲ | Service ▲ | Status ▲ | Result ▲ |
|------------|--|--|-----------------------------|---------------|----------|
| 06/15/2022 | Community Services Agency, Inc (COMSA) | Community Services Agency, Inc (COMSA) | RSI - After-School Programs | Referral Made | |

- [Edit Referral](#)
- [Referral Outcome](#)
- [Delete Referral](#)

10. From the [Participant Referrals](#) form, the action button the left of the referral will have three options: [Edit Referral](#), [Referral Outcome](#), and [Delete Referral](#).

Adding a Referral Outcome

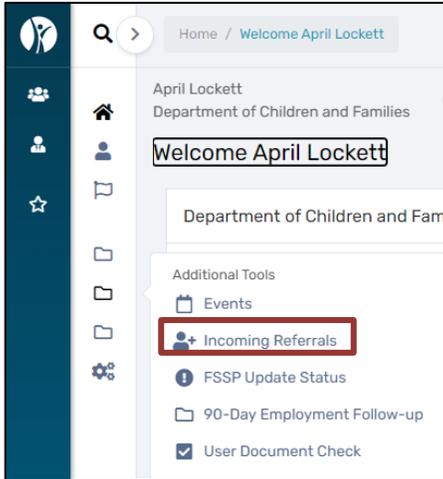
1. To add a referral outcome for a referral that does not have an outcome, select the [Referral Outcome](#) option from the action button.
2. The user will be directed to the second page of the [Referral](#) form to enter the appropriate information.
3. Once the [Referral Outcome](#) is entered, select [Finish](#).
4. The updated information will now reflect on the [Participant Referral](#) form.

Editing a Referral

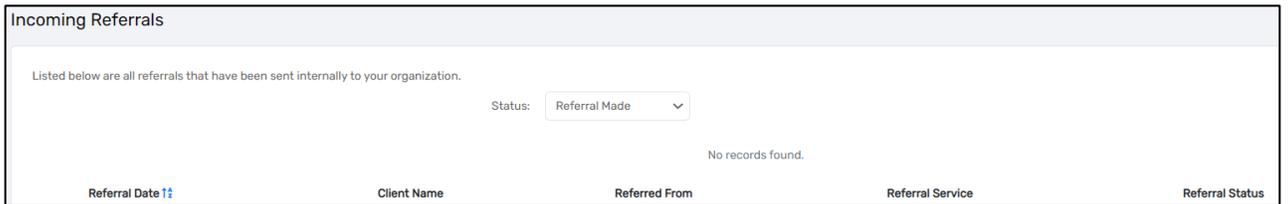
1. To make edits to a referral, select the [Edit Referral](#) option from the action button.
2. The user will then be directed to the [Referral](#) form where they may update any of the information to be correct.
3. Once the [Referral](#) and/or [Referral Outcome](#) information is updated, select [Finish](#).
4. The updated information will now reflect on the [Participant Referral](#) form.

Incoming Referrals

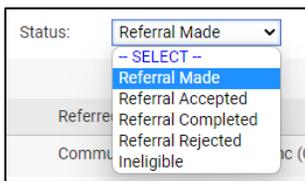
1. Navigate to the [Home](#) workspace, find the Additional Tools menu group, and select the [Incoming Referrals](#) Menu Option.



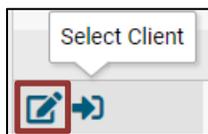
2. The [Incoming Referrals](#) form will display all incoming referrals that have been sent to the organization you are logged in as.



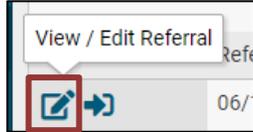
3. Users can filter the results based on the current [Status](#) of the referral.



4. Once the correct set of referrals is in focus, the user should locate the correct participant and select one of the two action buttons to the left.
 - a. Selecting the [Select Client](#) button will redirect the user to the [Participant Dashboard](#) in the [Participant Workspace](#).



- b. Selecting [View / Edit Referral](#) will open the referral details that outline the details of the referral that was made.
 - i. From the [Referral](#) form, the user may edit the [Referral Status](#), add [Comments](#), and enter the [Referral Outcome](#) information.



- 5. The Referral Source section will automatically fill in information from the user and the associated provider agency. The user may then adjust the [Status](#), leave a [Comment](#) and if applicable, add an [Associated Need/Barrier](#).

[Referral Outcome](#) ⌵

Outcome Information

Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged:

Appointment Date:

AM

Result Date:

Result:

Comments:

- 6. If the referral has an outcome at that point, the user may record the fields available on the [Referral Outcome](#) section. If the referral does not yet have an outcome, the user may select [Finish](#) and return to add the outcome at a later time.



Recording Referrals: Home Workspace > Additional Tools > Incoming Referrals